

# ERP Migration Project: Preparation Checklist

## 1. Define Why You're Migrating

- ☐ Identify limitations in your current ERP system
- ☐ Document the main goals of the migration
- ☐ Ensure all stakeholders understand the purpose

## 2. Review Your Current System

- ☐ Evaluate current ERP processes and performance
- ☐ Identify pain points and inefficiencies
- ☐ Gather feedback from end users

## 3. Involve the Right People Early

- ☐ Include IT staff and external consultants
- ☐ Engage business leads from key departments
- ☐ Get input from everyday users

## 4. Plan Your Timeline and Budget

- ☐ Estimate data cleanup and preparation time
- ☐ Plan team availability for testing and training
- ☐ Allocate budget for external support if needed
- ☐ Include buffer time for unexpected delays

## 5. Prepare Your Team for Change

- ☐ Develop training tailored to roles
- ☐ Offer hands-on sessions and support
- ☐ Communicate changes clearly and early
- ☐ Set expectations for go-live period

## 6. Test Before You Go Live

- ☐ Verify data accuracy post-migration
- ☐ Run critical workflows in test environment
- ☐ Confirm user roles and access levels
- ☐ Test integrations and performance

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## 7. Have a Post-Go-Live Plan

- ☐ Create a system for reporting and resolving issues
- ☐ Monitor system performance and data flow
- ☐ Support users during transition
- ☐ Schedule review of early performance